

Zephyr



CAIM

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Catherine Avery Investment Management LLC (CAIM) Named to PSN Top Guns List of Best Performing Strategies for Q4 2022

Quarterly PSN Top Guns List published by Zephyr identifies best-in-class separate accounts, managed accounts, and managed ETF strategies

Sarasota, FL—March 1, 2023 - CAIM announced today it has been named to the celebrated *PSN Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies for Q4 2022. The highly anticipated list, published by Zephyr, remains one of the most important references for investors and asset managers.

“With the growing interest in separately managed accounts, the PSN Top Guns List has attracted greater attention,” says Margaret Tobiasen, SVP of Data Distribution who cites PSN’s pioneering efforts as the first SMA database as the reason for the list’s popularity. CAIM has done remarkable work and we are pleased to include them as a top performer.”

CAIM offers primarily Separately Managed Accounts focusing on Dividends and ESG characteristics, in what we believe is a unique combination of the two focus areas. Our proprietary screens focus on fundamentals with high free cash flows and strong relative growth, with an overlay of strong and/or improving measures in Environmental, Social and Governance factors. The result is a portfolio of companies with above average dividend yield and dividend growth, as well strong corporate stewardship.

“We are delighted to be selected by Zephyr for this prestigious designation, and it reflects our research efforts in creating alpha with a lower risk and sustainable approach”, said Catherine Avery, CEO and Portfolio Manager of the firm.

Through a combination PSN’s proprietary performance screens, the [PSN Top Guns List](#) ranks products in six proprietary categories in over 75 universes based on continued performance over time.

CAIM’s Dividend Growth ESG strategy was named Top Gun 2-Star Category rating, meaning our Dividend Growth ESG strategy had one of the top ten returns for the one-year period in their respective strategy.

CAIM has received several Top Gun Designations in previous quarters this year for:

1Q 2022

2Q 2022, 1 year 2Q 2022, 3Q 2022, 4Q 2022 & 1 year 4Q 2022

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CAIM has outperformed its benchmark, the Russell 1000 Value index over the 1, 3, 5 and 7 year periods. Further, during the market downturn this year, we have significantly outperformed our indices with only a slight drawdown, illustrating the risk control characteristic of our approach. And for clients, we provide extensive research and communications, including a widely read Quarterly Commentary.

The complete list of PSN Top Guns and an overview of the methodology can be located at <https://psn.fi.informais.com/>. Registration is required.

About CAIM

CAIM is an independent, 100% woman owned investment management firm specializing in a low volatility equity strategy that focuses on high quality dividend paying stocks. Our philosophy is combined with finding companies committed to environmental, social and governance principles (ESG).

www.caimllc.com

About PSN

For nearly four decades, [PSN](#) has been a top resource for investment professionals. Asset managers rely on Zephyr's PSN to effectively reach institutional and retail investors rely. Over 2,800 firms, 285 universes, and more than 21,000 products comprise the PSN SMA database showing asset breakdowns, compliance, key personnel, ownership diversity, ESG, business objectives and strategy, style, fees, GIC sectors, fixed income ranges and full holdings. Unique to PSN is its robust historical database of nearly 40 Years of Data Including Net and Gross-of-Fee Returns. For more details on the methodology behind the PSN Top Guns Rankings or to purchase PSN Top Guns Reports, contact Margaret Tobiasen at Margaret.tobiasen@informa.com. Visit [PSN online](#) to learn more.

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